5.3 Training Tools and Documentation

A successful training program includes the development of training materials with the same "look and feel" as the transactions and screens that end-users will see in the new system. The training materials should be customized to the State's terminology and business practices. For those familiar with creating training materials, it can be a time-consuming and tedious effort. The use of quality training tools and incorporating consistent documentation standards will provide a systematic way to produce valuable training materials. The purpose of this section is to outline the training tools and development processes that will be used to create appropriate and useful training materials.

5.3.1 Accelerator Tools

The State has selected the RWD Info Pak® Suite to support the development of the project's end-user training materials. This suite of documentation tools provides a systematic way to document information for the end-user. By conducting each SAP transaction, the RWD Info Pak® tool captures each step and automatically converts the process into professionally formatted documents. These documents can be printed and used for training or reference purposes. The Publisher tool creates a "parent" document from which the remaining end-user documents can be created. Examples of these "child" documents include Work Instructions and Exercises to be used for instructor-led training. The Info Pak tools include the following components that will be used on this project:

RWD Info Pak® – Publisher will be used to create SAP documentation automatically, simply by running SAP transactions. During development, RWD Info Pak captures each transaction step and user action and converts the results into professionally formatted documentation that can be leveraged for many different uses. After training, these recorded procedures will be used online as the basis of a real-time electronic performance support system, including work instructions and quick reference guides.

RWD Info Pak® – Glossary, linked with RWD Info Pak – Publisher, maintains centralized terms and definitions for incorporation into Info Pak documents. RWD Info Pak – Glossary enables the project team to automatically incorporate the State's terminology directly into the training content.

RWD Info Pak® – Web Architect creates web site navigation pages. Web Architect provides drag-and-drop features that allow an approved user to create multiple views of all kinds of web

content, whether produced by RWD Info Pak - Publisher or other environments. It also maintains project completion statuses and allows for easy project monitoring and reporting.

RWD Info Pak® – Help Launchpad creates context-sensitive links from the documentation directly into the SAP Help System. With Help Launchpad installed, the SAP end-users can find the help they are looking for directly from within the SAP transactions.

RWD Info Pak® Simulator is a software simulation tool that records developers' actions as they work through a particular task or application. As the developer uses the application, the RWD Info Pak Simulator "watches" and records all interactions including menu selections, data entry, and mouse clicks. In addition, the RWD Info Pak Simulator provides easy-to use editing functionality that allows the developer to supplement a recording with notes or voice overlays. Once complete, the simulation can be exported as a Java applet or dynamic HTML (DHTML) for use in Web-based training courses, classroom training, or an online help system. End-users need only a standard web browser to view the simulations; no plug-ins or players are required.

The RWD Info Pak Simulator provides dynamic, real-life experiences that could not be captured with traditional training approaches. This tool creates the same training content an end-user would see if connected to a live system or working with an instructor. Because the simulations can be run and saved for future training requirements, the RWD Info Pak Simulator allows you to reach any group of end-users over the Internet or organization intranet from any location, at any time.

With one recording, four separate simulations can be created by using the Auto Playback, Standard, Self Test, and Assessment modes.

Auto Playback mode — The simulation resembles a video replay of the task. The end-user can play, pause, or stop the playback. This mode is useful for someone with little or no experience with an application.

Standard mode — The end-user is guided through the task. The system provides step-by-step instructions for completing the task. Using Standard mode, the developer has the option of annotating the task with relevant information, making the simulation even more useful to the end-user.

Self-Test mode — The instructions and visible clues found in the Standard mode are no longer present, giving the end-user the opportunity to complete the task on his/her own. If the end-user

enters inaccurate information, the Self Test mode provides clues to guide the end-user towards the correct answer.

Assessment mode — Objectives and functionality are similar to that of the Self-Test mode. In addition, this mode offers the ability to capture and send user results to an external database or learning management system for reporting. Assessment output is provided in a generic format to allow for integration into custom or third-party applications.

By creating four simulations from one RWD Info Pak Simulator recording, a complete solution is created. End-users master their tasks by utilizing the Auto Playback, Standard, and Self Test modes, and the Assessment mode allows for end-user results to be captured.

5.3.2 Training Material Development

A Business Process Master List (BPML) collectively defines the functional scope of the implementation and is created in the Business Blueprint phase. Within the BPML, Business Process Procedures (BPPs) are identified by name with a defined owner. It is then the responsibility of these BPP owners to jointly define and document, in detail, the purpose, business process, activities, and data requirements of each business function (for example, “Create PO”). A sample BPP is demonstrated in Section 4.6.1

For the purposes of this project, it is recommended that the project team develop BPPs to support all end-user training materials. All end-user training will have the same look and feel in terms of document structure. The RWD Info Pak® – Publisher tool is the recommended tool to use in the development of BPPs. In RWD training terms, the BPP will become the “parent” or master document. All other training materials or “child” documents will be created from the parent BPP. By utilizing the RWD Info Pak® tools, changes to training materials only need to be made once, to the parent document.

The following end-user documentation is recommended for the SCEIS Project:

- Work Instructions – These Info Pak child documents contain overview information, step-by-step End-user procedures, field description tables, screen shots, and screen flows (if desired). They are designed to help the End-user during the training exercises and back on the job.
- Concepts – These PowerPoint slides contain conceptual information that gives users an overview of the specific SAP functionality being taught. They also provide an introduction to the transactions that will be exercised before getting into the system.

- Simulations – These are static or interactive recordings of a transaction or series of transactions. The user can observe the transaction being performed or, if interactive, can perform specified actions during the simulation.
- Exercises – These Info Pak child documents contain the data required to complete a transaction in a training environment. Questions are included to help reinforce learning. All exercises will need to be able to be run in the training environment and, as such, need to have the correct data that makes them work.

A sample Work Instruction, Course Concepts Presentation, and Course Exercise are included in Section 4.6.

5.3.3 Prototype of Training Materials

A prototype of the classroom training materials will be created by the training coordinator/editor. This prototype will serve as a guide for the 'look and feel' of the final deliverable that will be given to participants during the training event. This prototype should be reviewed and signed-off by the project functional leads and project manager. The prototype will contain the following training materials:

- Sample binder with cover
- Sample table of contents
- Sample tab dividers
- Sample overview/concepts (slides)
- Sample work instruction
- Sample exercise
- Sample simulation

5.3.4 Training Development Roles

The following roles are included in the training development process. These roles will be assigned to multiple project team members.

- Developer – This is the project team member who is responsible for developing the BPPs. In addition to these documents, the developer is responsible for developing the work instructions, simulations, and exercises.

- Training Coordinator/Editor – This is the project team member who is responsible for enforcing standards and helping developers with issues concerning the Info Pak suite of tools. The Training Coordinator/Editor is also responsible for reviewing all documents from an instructional design standpoint and maintaining documents in Web Architect.
- Functional Lead – This is the project team member who is responsible for reviewing all documents for technical accuracy in his/her area of responsibility. The Functional Lead is also responsible for signing-off on documents once they are complete.
- Training Lead – This is the Change Management/Training Lead that is responsible for overseeing the training development effort.

5.3.5 Training Development Standards

The process to support and manage the development of training materials will include and involve various project team members knowledgeable of the specific subject area and will require input, feedback, and signoff before delivery.

The primary goal of this process is to ensure that all training materials are consistent in format, style, and level of detail, and are accurate in content.

All training materials will have the standard SCEIS project logo as part of the header and footer detail. Each document will also be assigned a status to ensure that version control is maintained during the review and approval process.

Document Status

The following document status version conventions are recommended to track each training material item:

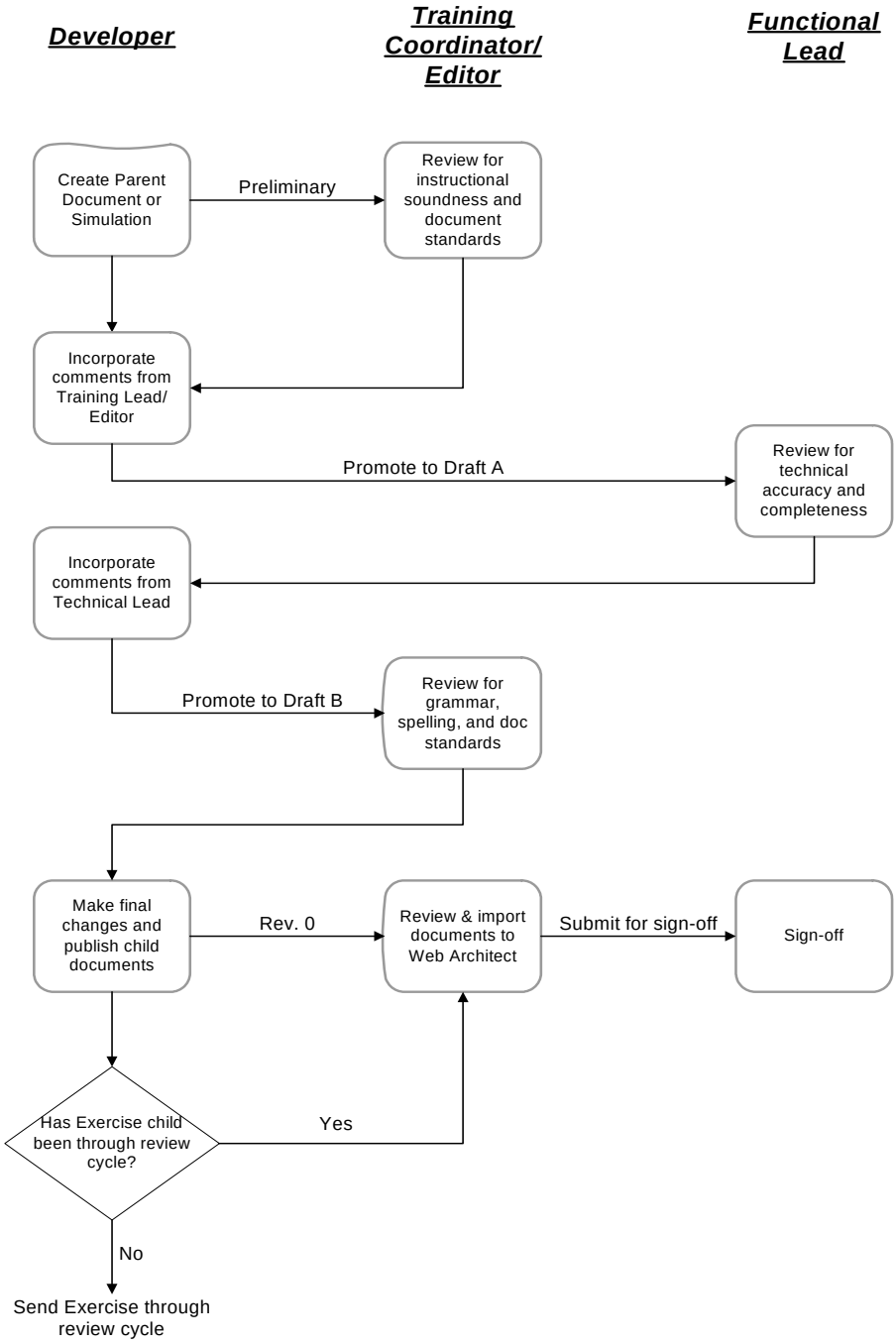
- **Preliminary**. For Parent documents, this document is an initial recording, with tables and steps completed to the best of the Developer's knowledge. For Exercises, this would be a newly published document with initial questions and answers added.
- **Draft A**. This document has been reviewed by the Training Coordinator/Editor and has been updated by the Developer.
- **Draft B**. This document has been reviewed by the Functional Lead and has been updated by the Developer.

- **Rev. 0**. This is the final stage of the document. This document has been reviewed again by the Training Coordinator/Editor and has been updated by the Developer. It is now ready to be imported into Web Architect and submitted for sign-off.

Development, Review, and Approval Process

The following process flow outlines the recommended steps to be applied internally to create, review, test, and receive final approval for training documentation.

Exhibit 5.3.5-1 Training Material Development Process



The project team members will carry out the document development and review process. This process has been created primarily to establish an internal reference for gaining documentation approval and client signoff. This process also establishes guidelines to facilitate the process of capturing the requisite knowledge of SCEIS Project Team members with respect to the newly designed business processes that end-users will use.

Develop Preliminary Document - The project team members will create a preliminary document and provide the document to the Training Coordinator/Editor for review.

Run Preliminary Document through the RWD Info Pak Glossary – This step takes the parent document and puts in a State standard definition. The RWD Info Pak Glossary will need to be reviewed by a State project team member and be kept up-to-date. This step can be done for individual document or for an entire directory.

Training Coordinator/Editor Review - The Training Coordinator reviews the documents for instructional elements, quality, proper grammar and punctuation and conformance with standards. The Training Lead also reviews documents for proper usage of the template styles.

Incorporate Comments - The Developer incorporates comments from the Training Coordinator/Editor review and promotes the document to Draft A.

Functional Lead Review - The SCEIS Functional Lead reviews the document for content and technical accuracy. The Functional Lead will be required to sign off on the course materials following the completion and correction of all comments.

Incorporate Comments - The Developer incorporates comments from the Functional Lead review and promotes the document to Draft B.

Import Documents to Web Architect - The Training Coordinator/Editor reviews the documents one final time before importing them to Web Architect for storage. This will make the documents available to end-users via the SCEIS Intranet site.

Sign-off - The Training Coordinator submits the document to the Functional Lead for sign-off.

5.3.6 Document Management Guidelines

File-Naming Conventions

Establishing a standard file-naming convention enables all team members to locate and identify documents quickly, eliminating the confusion caused by random file-naming methods. When a new document is created, the Info Pak® tool will prompt the project team member to identify a naming convention for his or her file. An example of this naming convention follows:

Exhibit 5.3.6-1 Sample Training Material Naming Convention

File Naming Convention	Example
Initiative_Title_Type_Version	CRM1_CreateServiceProcess_P_A

Multiple naming conventions will need to be established and will be discussed during the RWD Info Pak® training to be held during the Realization phase.

5.3.7 Document Storage

To provide adequate access to the training materials for all end-users, it is recommended that the SCEIS Team use RWD Info Pak® – Web Architect as the repository for all end-user training documentation. The Web Architect database will be created during the Realization phase. Specific policies and procedures surrounding the use and storage of materials in Web Architect can be found in the RWD Info Pak – Web Architect manual and will be discussed during the RWD Training. Typically, these documents can only be accessed through an Intranet site.

During development, the documents will be stored on the SCEIS shared drive with a specific location to be determined.

5.3.8 Training Clients and Exercise Data

There will need to be a determination for each Training Delivery Go-Live as to what the training environment will look like. Due to the potential multiple instances used for Financials, Materials Management, BW, and HR, there might be multiple training clients inside the various instances. The training master client will need to be identified in the QA environment with additional training delivery clients as appropriate.

Exercise Data is one of two things – consumable or non-consumable. Consumable data is data that can only be processed once before it is used up. Non-consumable data is data for a transaction that can be processed over and over without issue. All exercises that have consumable data need to be set-up in the master client according to the established refresh schedule.